

CASE STUDY

Swansea Improves Document Lifecycle Management and Team Collaboration With Open Source ECM

Published: May 4, 2006



Swansea Housing Association Increases Productivity, Reduces Costs

As a fast moving organization specializing in property management and real estate development, Swansea Housing Association knew it needed a new system for managing content. The Association develops and manages over \$750 million in property and real estate and works with planners, architects, and public administration officials over the course of several projects. As you can expect, Swansea generates an overwhelming amount of documentation.

As documents made their way through their various stages of the lifecycle (from draft to reviewed to approved to archived), employees and those outside the company collaborated on and shared these documents via unsecured email. However, due to the difficulty in managing and manually tracking these documents, Swansea employees often found they had the incorrect version of a document or the discussions and decisions associated with an earlier version had been deleted or lost.

Swansea Housing Association's other problem revolved around their legacy collaborative platform, which required customized programming to define the particular workflows for lifecycle management of their documents. A workflow stipulates how the document proceeds through its lifecycle and who has authority to review, change, and approve it.

For Swansea, to change a workflow meant they had to call in an outside programmer, an expensive and time consuming procedure. And, for each new project, Swansea essentially had to start over from scratch

because they did not have a way to reuse configurations from earlier projects.

Hence, Swansea wanted a flexible yet secure platform for organizing their content. They wanted the ability to set up new project templates quickly and easily without incurring costly configuration and unnecessary project delays.

The new system needed to give users the ability to easily create and participate in an auditable document lifecycle where access is given only to those who need it. And finally, Swansea Housing Association wanted an open and scalable platform that supported their current content management requirements as well as the flexibility to add new features or modules in the future at lower cost.

Alfresco: Easy to use, scalable and flexible open source ECM

Ultimately, Swansea chose Alfresco, the leading open source alternative to enterprise content management (ECM). Swansea realized, when comparing similar

CASE HIGHLIGHTS

Rivet Logic helps Swansea deploy open source Alfresco™ to provide flexible, secure enterprise content management.

- **Organization** - Swansea Housing Association, a midsize property management and real estate development organization.
- **Challenge** - To find a better way to manage the increasingly overwhelming amount of new and existing documents, lower IT costs, and improve productivity.
- **Solution** - Swansea Housing Association turned to Alfresco, the open source alternative for enterprise content management. Rivet Logic and Aarden Ringcroft – Alfresco Certified Gold Partners – provided configuration, deployment, and support assistance to ensure a rapid and successful rollout.
- **Results** - Swansea easily manages, tracks, and shares files through the Alfresco content repository, eliminating ad-hoc workflows in favor of structured document lifecycle management and improved team collaboration.

programs, that Alfresco offered significantly lower costs due to its open source development and licensing model. States Geoff Pettifor, Swansea's Director of Development, "After looking at various alternatives, we could clearly see the benefits of Alfresco over our existing system."

"After looking at various alternatives, we could clearly see the benefits of Alfresco over our existing system."

-Geoff Pettifor,
Director of Development, Swansea

Swansea wanted a system that it could largely manage by itself: Alfresco allows users to easily modify rules, business processes, and workflows. Previously, cloning a project meant several days of work; with Alfresco's intuitive space templates, the Association can set up new projects using the same workflow, rules, and structure in a matter of minutes.

In addition to implementing the Alfresco platform, Swansea needed to migrate legacy data, including document version histories. Alfresco's certified partners, Rivet Logic Corporation and Aarden Ringcroft, Ltd., oversaw implementation and data migration.

"We extracted all of the legacy data and converted it to an XML format that conformed to Alfresco's .acp file import type," states Mike Vertal, Rivet Logic's CEO.

"The process took only a matter of days, and Swansea was up and running shortly after we completed the migration and configured a fail-safe and secure deployment of the Alfresco platform." Louis LaFontisee, Aarden Ringcroft's Managing Director added, "Alfresco's superior document management and workflow capabilities will help Swansea more effectively reap the benefits of industry wide collaboration and teamworking initiatives."

Swansea enjoys file sharing and collaboration in a secure environment

The beauty of Alfresco is its intuitive, easy-to-use "Intranet-like" environment. Repository content is accessible through any Web browser, so Swansea employees can easily access the program whether at work or on the road. Even better, Alfresco supports Microsoft's native file system protocol (CIFS), so any folder within the Alfresco repository can be mapped to a Windows network drive. With this facility, Swansea users may access a document as if it were on their local disk drive – providing a seamless interface to the repository. All the while, the workflows, rules, and permissions are still enforced by Alfresco.

The program is highly secure, supporting user authentication and optional LDAP integration, so Swansea's partners may only access content for which they have been given permission. Alfresco's support for the WebDAV protocol enables the partners to access documents remotely using any WebDAV-compliant

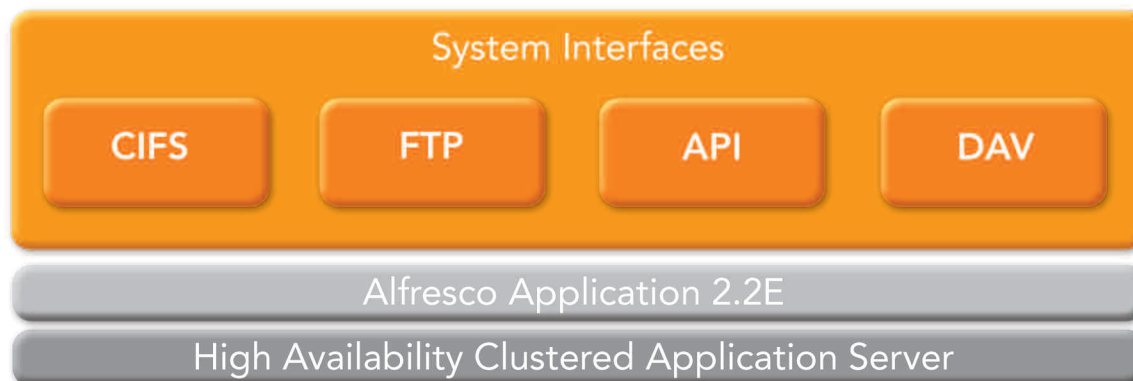


Figure 1. A robust open source ECM solution based on Alfresco.

application, including Microsoft Office applications.

"We now have the ability to manage our process and workflows in a way we could only achieve after placing an expensive call to our developers

-Geoff Pettifor

Because all documents reside in the Alfresco repository, Swansea users now email a link to the document, rather than the document itself – increasing security and ease of document tracking. Swansea no longer risks the loss of important data to ad-hoc workflows and inadequate version control. Version history and document security are maintained by the repository and are easily viewed with a mouse click.

"Smart Spaces," another Alfresco feature, allows users to set rules and take actions on content within a space or directory/folder. For example, a user can set a rule that states when a document comes in, the system sends an email automatically to team members.

Swansea also enjoys Alfresco's support for "forums," or discussion groups. Instead of sending dozens of emails around to team members, all discussions pertaining to a document or project takes place within the Alfresco environment (similar to Internet discussion boards or forums). Team members can also attach a discussion to a document, ensuring all discussions persist through the entire lifecycle of the document. This productivity booster will save Swansea thousands of hours in wasted time trying to recreate lost knowledge, something Swansea had to do previously.

Moreover, Swansea can now assign individuals a number of roles, depending on their project or team status, with just a few clicks of the mouse. Alfresco supports the configuration of user-defined roles that are collections of very fine grain permissions. This allows Swansea administrators to give permission to a user that is uniquely tailored for their role. For example, some users ("contributors") may only create documents, whereas other users ("editors") may only edit existing documents.

Sums up Pettifor, "We now have the ability to manage our process and workflows in a way we could only achieve after placing an expensive call to our developers. Alfresco represents a major opportunity to change and enhance the way we work."

To learn more, call Rivet Logic

For more information about Alfresco and how it can benefit your business, call Rivet Logic at 703.234.7761 or visit our Web site at rivetlogic.com.

ABOUT RIVET LOGIC

Rivet Logic is an award-winning consulting and systems integration firm that helps organizations better engage with customers, improve collaboration and streamline business operations. Through a full suite of open source content management services, Rivet Logic enables organizations to fully leverage the power of industry-leading open source solutions. With deep expertise in the Alfresco Enterprise Content Management platform, Liferay Portal, and JBoss

Enterprise Middleware, Rivet Logic crafts content-rich solutions that power the new generation of Web properties, Enterprise 2.0 applications and collaborative communities. With offices in Reston, Virginia and Cambridge, Massachusetts, Rivet Logic serves clients across a wide range of industries. Rivet Logic—Artisans of Open Source. Visit rivetlogic.com